

DRAFT

## PERSONAL SUPPORT PLANNING POLICY MEMO

**TO: Provider Management & Direct Care Staff, all State and Contracted Staff**

**FROM: Jeff Sturm, Developmental Disabilities Program Director**

Personal Support Planning using the forms created by the Statewide workgroup and edited by Program Design Inc., based upon feed back from the Region 3 and Montana Developmental Center field tests, conducted in January of 2006, will begin July 1<sup>st</sup> in Region 3 and at the Montana Developmental Center. **The PSP process replaces the current IP process upon completion of training by the State Training Officers.** The Centers for Medicare and Medicaid (CMS) require in the Waiver approval process that health and safety is assured, as well as Person-Centered Planning be used for all individuals in Waiver services and have incorporated questions pertaining to the State's Quality Assurance process as well as the State's Person – Centered Planning approach as part of the Waiver application. General fund services have the same requirements as Waiver services.

**This is not a pilot or a draft! It is the beginning of full implementation of the PSP process statewide with regions 2, 1, 4 and 5 to follow in the order listed.**

Once the team members for an individual in Developmental Disabilities Services have been trained and receive a certificate of attendance, the Personal Support Planning process should begin for all adults in the 0208 Waiver within 60 days. Individuals in General Fund services will be required to have completed Personal Support Plans beginning July 1, 2007. This does not apply to individuals in the Community Supports Waiver or children. All who are trained are expected to use the standardized forms and the process authorized by the State Developmental Disabilities Program.

It is required that the Vision Statement be completed prior to the meeting and the Personal Support Planning Process ( PSP ) taught by the State Training Officers must be used in all annual planning meetings after July 1, 2006 upon completion of the course and all attendance requirements have been met. The Outcomes Form must be completed by the Case Manager and QMRP'S after the planning meeting. **All who engage in the Planning process are required to attend and complete a training session conducted by the State Training Officers.**

Case Managers and QMRP'S have until the next annual IP to gather all the information required on the Personal Support Planning forms. If they can be completed before the first PSP meeting that is desirable but the importance of being accurate and thoughtful in the process takes precedence over incomplete and hastily gathered information but all Personal Support Plan (PSP) forms must be completed thoroughly and accurately before the second annual PSP meeting.

Once the PSP is formally completed and all documents are in place, thereafter, formal information gathering and updating will begin in the 3<sup>rd</sup> quarter reflecting interviews with the individual and the team. Providers are expected to adjust assessments and progress reports to reflect the type of content needed (see probe questions) in PSP instructions following completion of training and certification in the PSP process.

After the formal PSP meeting with the individual in services and the team, providers will develop implementation plans towards the actions developed during the meeting and forward them upon completion to the Case Manager and to all applicable team members to be kept with the PSP document in the individual's file.

If a special planning meeting is needed before the annual meeting, Case Managers will document all changes on the PSP forms with the individual and the team, the vision maybe re-written if needed and sign the signature page.

**The PSP process replaces the current annual pre-IP activities for all individuals and their teams who have been trained by the State Training Officers.** Until further notice, the current IP process will be used for all individuals who are referred to and are on the waiting list.

Individual cost plans are updated at least annually so they accurately reflect the dollars available to the individual so that they and their team can best determine how to meet Vision Outcomes. Cost plans can be updated as needed if circumstances change.

The State Quality Assurance process will document and monitor utilization of the State Personal Support Planning forms as well as document and monitor that the Personal Support Planning meetings are being held according to the State PSP process taught by the State Training Officers. The Quality Assurance process to be followed will be developed and published for all stakeholders by the end of the calendar year. The State of Montana assures the Centers for Medicare and Medicaid (CMS), upon receipt of federal dollars, it will monitor and provide oversight for all State Qualified Providers of Developmental Disabilities services monitoring individual outcomes for visions of a better life for all people in Developmental Disabilities Services!